As noted, there are many factors that determine, on a county-by-county basis, Idaho's demand for commercial airline travel. Analysis completed in this study shows that, on an annual basis, Idaho counties are generating an estimated 1,937,180 passenger originations. Results from the study show most of these originating commercial airline passengers choose an Idaho airport for their commercial airline travel. A notable percentage, however, choose to drive to an airport in a neighboring state to begin their commercial airline trip.
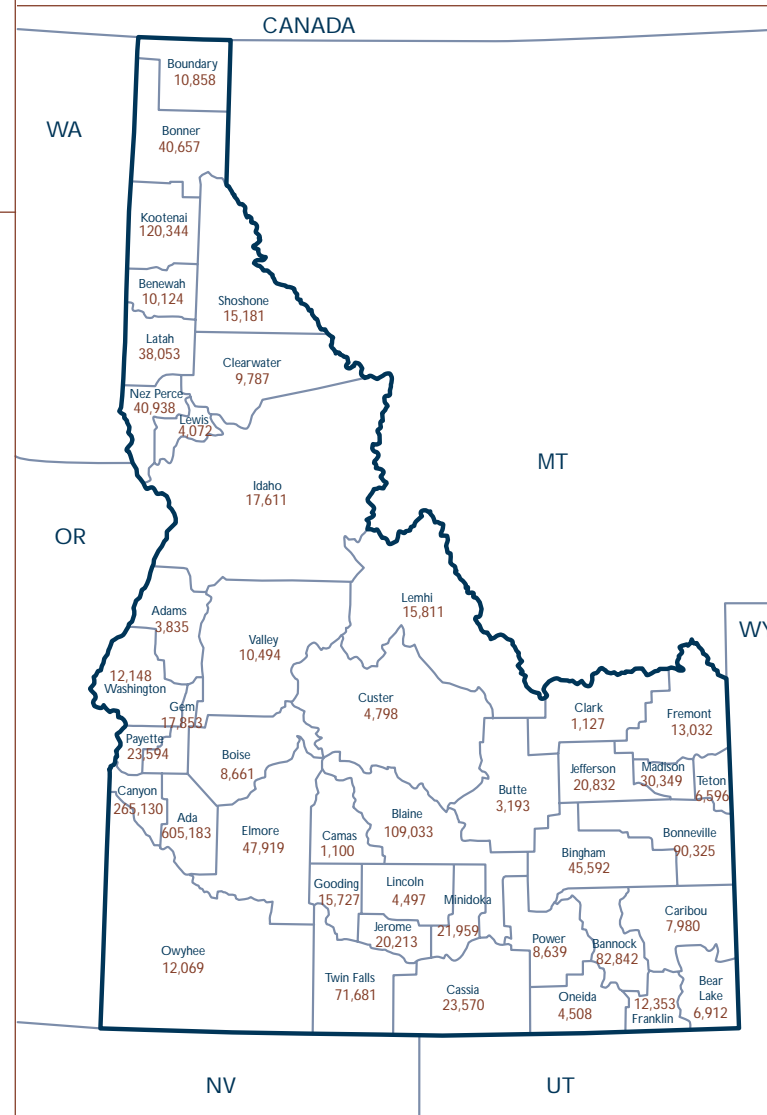
The Air Passenger Demand Study shows that 22.6 percent of all Idaho generated passenger originations now leave the State to begin their commercial airline trip at a more distant competing airport in a neighboring state. In most instances, passengers report that they make this decision based on lower fares and higher levels of airline service as measured by number of carrier choices, non-stop destinations served, and flight frequencies.

Last year, an estimated 438,642 of Idaho's originating passengers chose to begin their airline travel from either Salt Lake City International, Spokane International, or Missoula International. Over 96 percent of these originating passengers chose to fly from either Salt Lake or Spokane. The Air Passenger Demand Study also determined that there are some passengers from neighboring states who drive to Idaho, primarily Boise Air Terminal, to begin their commercial airline travel. The study concluded that an estimated, 85,842 passenger originations are now attracted to Idaho commercial airports each year.

Passenger Loss and Attraction

Passenger Originations by County 2001

County		County	
Ada	650,183	Gem	17,853
Adams	3,835	Gooding	15,727
Bannock	82,842	Idaho	17,611
Bear Lake	6,912	Jefferson	20,832
Benewah	10,124	Jerome	20,213
Bingham	45,592	Kootenai	120,344
Blaine	109,033	Latah	38,053
Boise	8,661	Lemhi	15,811
Bonner	40,657	Lewis	4,072
Bonneville	90,325	Lincoln	4,497
Boundary	10,858	Madison	30,349
Butte	3,193	Minidoka	21,959
Camas	1,100	Nez Perce	40,938
Canyon	265,130	Oneida	4,508
Caribou	7,980	Owyhee	12,069
Cassia	23,570	Payette	23,594
Clark	1,127	Power	8,639
Clearwater	9,787	Shoshone	15,181
Custer	4,798	Teton	6,596
Elmore	47,919	Twin Falls	71,681
Franklin	12,353	Valley	10,494
Fremont	13,032	Washington	12,148

Total Idaho Generated Orginations   1,937,180

Current Demand vs. Potential Market Area Demand

	Current Enplanements	Enplanements In 60/120 Minute Market Area
Boise Air Terminal	1,240,080	1,016,797
Idaho Falls Regional	118,090	188,250
Lewiston - Nez Perce County	61,024	73,823 *
Pocatello Regional	45,152	115,754
Pullman/Moscow Regional	28,128	57,947 *
Friedman Memorial (Sun Valley)	59,073	111,080
Joslin Field - Magic Valley Regional (Twin Falls)	32,833	134,999

* Does not include all demand from areas in Washington that are within these airport's 60-minute drive time
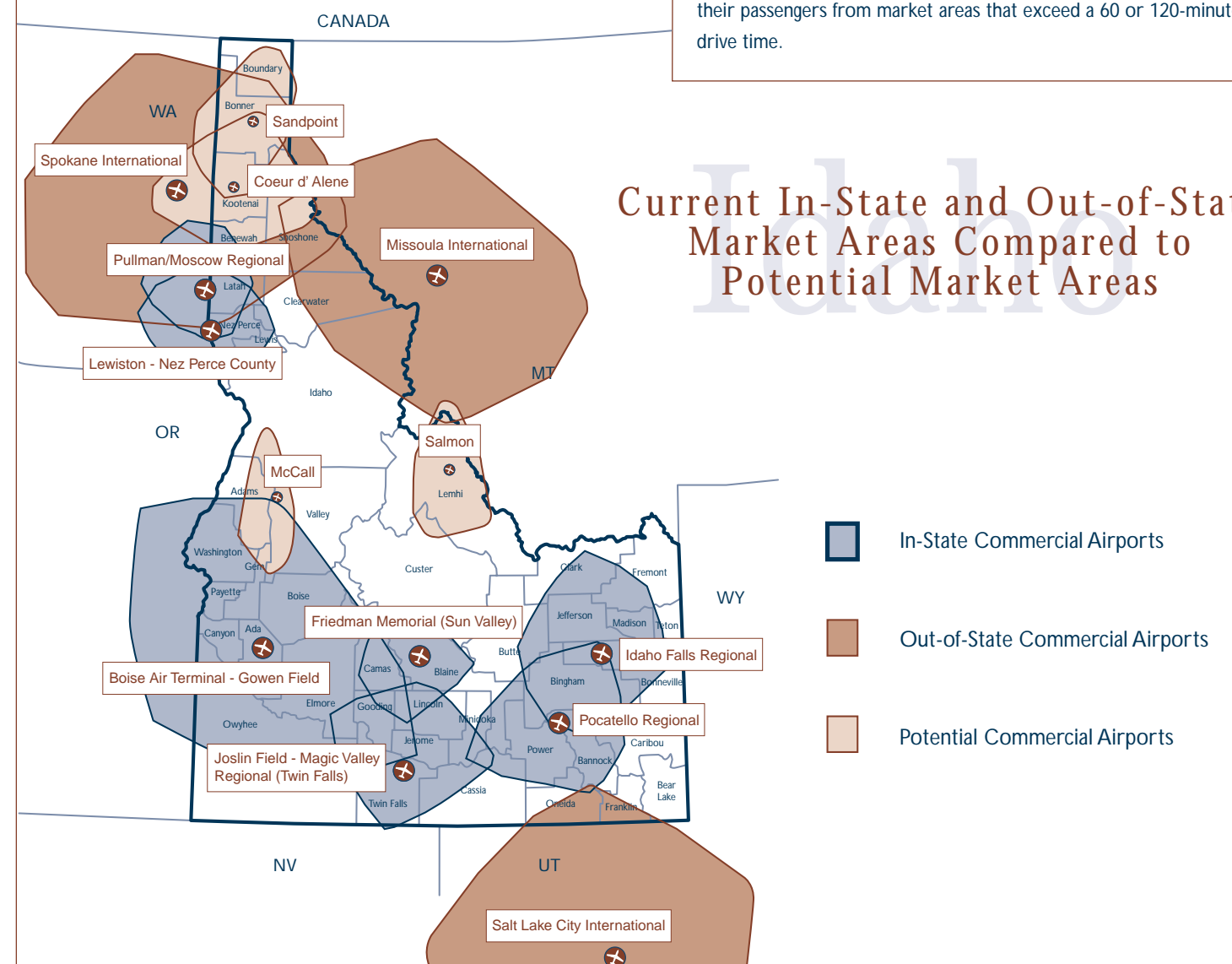
Each existing commercial airport in Idaho and in nearby states was assigned a drive time market area. For the smaller commercial airports, this drive time was 60 minutes, and for the larger airports this drive time was 120 minutes. In addition to these drive time market areas, findings from the Air Passenger Demand Study were also used to identify each airport's actual market area. Data from various study diagnostics efforts were used to identify each airport's current passenger attraction from each Idaho county. The study also identified each airport's ability to attract passenger originations from nearby states, and it identified again, on a county-by-county basis, areas of the State where Idaho generated commercial passengers are served by a competing airport in a neighboring state.

The Air Passenger Demand Study confirmed that each Idaho commercial airport, with the exception of Boise Air Terminal, has more originating passenger demand in its 60-minute market area than it currently serves in terms of annual passenger enplanements. Almost all study airports "lose" passengers from their market area to larger airports, both within and beyond the State. The study also concluded, however, that almost without exception, the study airports are drawing their passengers from market areas that exceed a 60 or 120-minute drive time.

Current In-State and Out-of-State Market Areas Compared to Potential Market Areas

■	In-State Commercial Airports
■	Out-of-State Commercial Airports
■	Potential Commercial Airports